

Behavioral Intelligence & Narrative Stability Assessment

Qiddiya: Identity, Anticipation, and Delivery



Powered by ENODO Global's IaaS Business Intelligence Platform

December 2025



Executive Summary:

ENODO's IaaS platform assessed public perception, identity alignment, and narrative stability surrounding Qiddiya, one of the Kingdom's flagship giga-projects in Vision 2030. The analysis revealed a project operating from a position of high identity stability (78.4/100), anchored in national ambition, youth alignment, and strong symbolic legitimacy.



Qiddiya is not perceived merely as an entertainment development project. It functions as a future-identity engine and physical manifestation of Saudi Arabia's evolving social contract, shifting from welfare provision to quality-of-life creation. Public discourse reflects broad belief in the necessity of Qiddiya, even as concerns emerge around timing, infrastructure friction, and personal cost.

The main challenge identified by IaaS is not opposition to the project, but a growing gap between what people are being promised and what they are experiencing day to day. The state communicates in the future about what will be achieved, while citizens view the project in the present as traffic congestion, construction dust, and rising living costs. This gap has not yet destabilized trust, but it represents the primary risk factor if expectations are not met, construction is delayed, and management falters.

“The value of IaaS is its ability to identify when anticipation starts to turn into fatigue, long before that fatigue hardens into resistance.”



Strategic Assessment:

In Saudi culture, public criticism of major government projects is uncommon. Social norms around unity, respect, and honor encourage people to support national initiatives rather than openly challenge them. Openly opposing these projects can carry social and reputational consequences, discouraging many people from expressing criticism in public. As a result, the official narrative presents Qiddiya as a symbol of post-oil modernity and global relevance, reinforced by coordinated media, influencers, and institutional messaging.

Public sentiment reveals a more layered and complex reality beneath the surface. Youth-driven enthusiasm, particularly around gaming and esports is genuine and emotionally invested. At the same time, there is pragmatic skepticism regarding delivery timelines, transport readiness, and affordability. Notably, the low irony score indicates that cynicism has not yet taken root. Saudis largely believe in the Vision 2030 mandate and view Qiddiya as the natural evolution of the national identity. The friction point is therefore not belief, but in delivering on the promise. If delays continue and people don't see real progress in their daily lives, public anticipation may gradually give way to fatigue. The challenge lies in managing expectations and perception surrounding the project. It is not a question of legitimacy. It is an important distinction that traditional brand management does not capture.

Data Analytics:

Sentiment Analysis:

Positive: 63%

Neutral: 24.5%

Negative: 12.5%

Positive sentiment is fueled by a strong sense of national pride, particularly among younger Saudis who see the Gaming and Esports District as validation of their interests and a symbol of the Kingdom's future. Excitement also centers on Qiddiya's role in hosting global events, which reinforces Saudi Arabia's image as an emerging international destination. Negative sentiment, by contrast, is not rooted in opposition to the project itself. Instead, it reflects practical, day-to-day concerns about construction dust and traffic on Riyadh's outskirts, doubts about completion timelines, and questions about whether ticket prices and experiences will remain accessible to middle-class families. These conversations signal caution and realism rather than ideological rejection, underscoring that support for Qiddiya remains intact even as expectations are closely scrutinized.

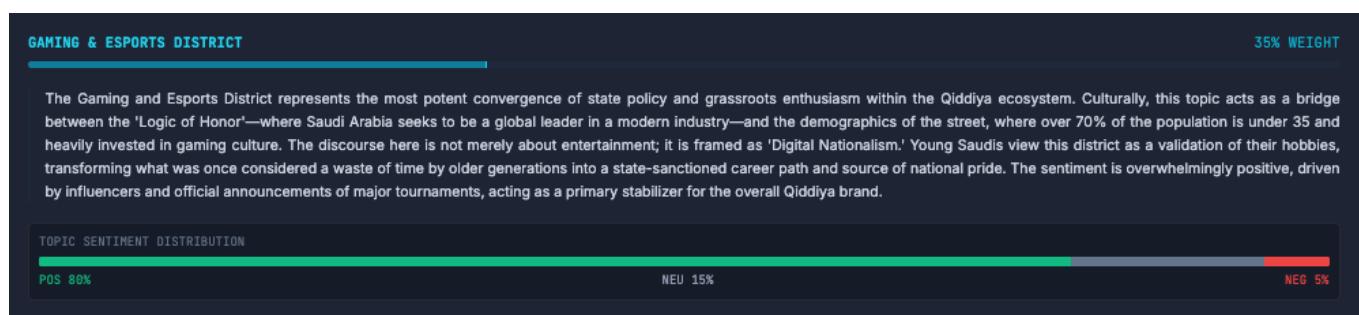


Topic Modeling:

IaaS topic modeling breaks down how people talk about Qiddiya into distinct themes, showing which parts of the project strengthen public confidence and which ones create uncertainty or tension. The analysis reveals how different elements of Qiddiya, such as gaming, theme parks, infrastructure, jobs, and social change, play a distinct role in shaping perception. Some topics act as narrative stabilizers that generate excitement, pride, and long-term belief in the project. Others function as friction points, where everyday concerns, questions, or frustrations emerge. By following how frequently each topic appears and the sentiment around it, IaaS helps identify where public excitement remains strong, where support is cautious, and where minor issues could grow into larger perception risks.

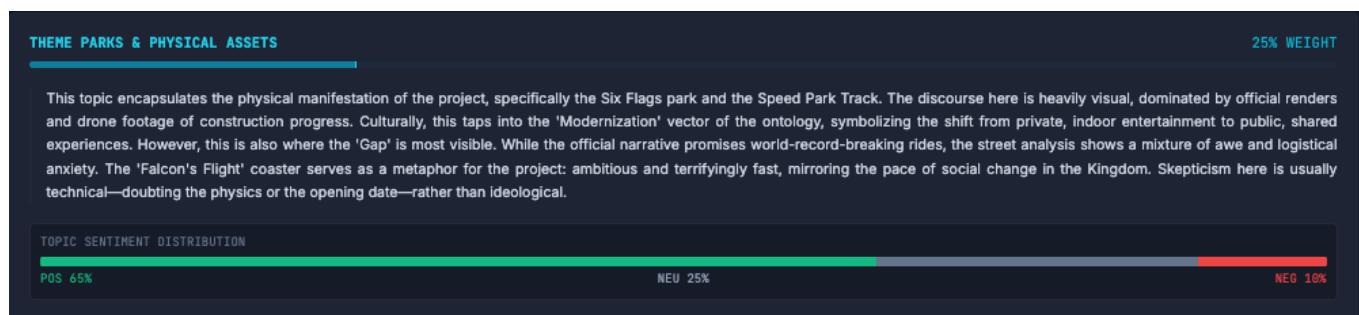
Gaming & Esports District: 35% Weight (Sentiment: 80% Pos / 15% Neu / 5% Neg)

This is the strongest stabilizing pillar of the Qiddiya project's identity. The discourse frames the district as "Digital Nationalism," validating youth culture and transforming gaming from a marginal pastime into a state-endorsed career path. Influencers and tournament announcements act as narrative accelerants, which anchor enthusiasm and trust.



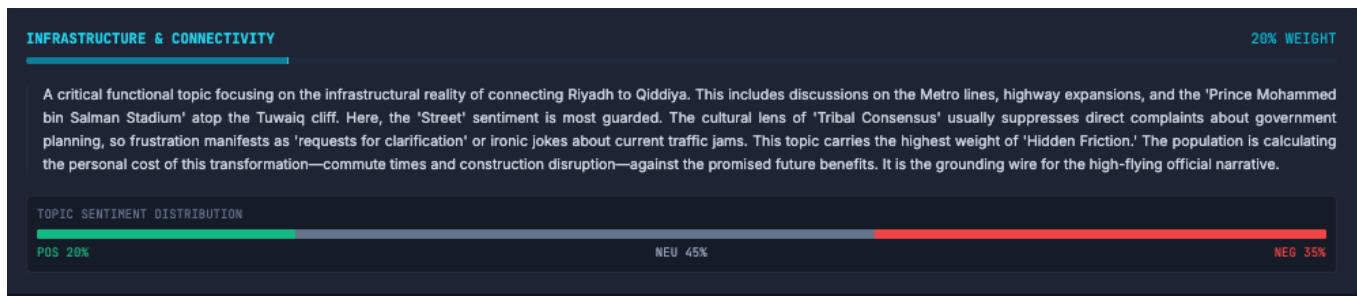
Theme Parks & Physical Assets: 25% Weight (Sentiment: 65% Pos / 25% Neu / 10% Neg)

Six Flags, the Speed Park Track, and flagship attractions like Falcon's Flight dominate visually driven discourse. Amazement is high, but so is logistical anxiety. Skepticism here is technical in nature, focused on feasibility and timelines. The assets symbolize modernization, but also expose the delivery gap most clearly.



Infrastructure & Connectivity: 20% Weight (Sentiment: 20% Pos / 45% Neu / 35% Neg)

This is the core friction point. Discussions of metro lines, highways, and daily commutes reveal the highest concentration of suppressed frustration. Cultural norms convert complaints into jokes or clarification requests, but the underlying perception is personal cost versus promised benefit.



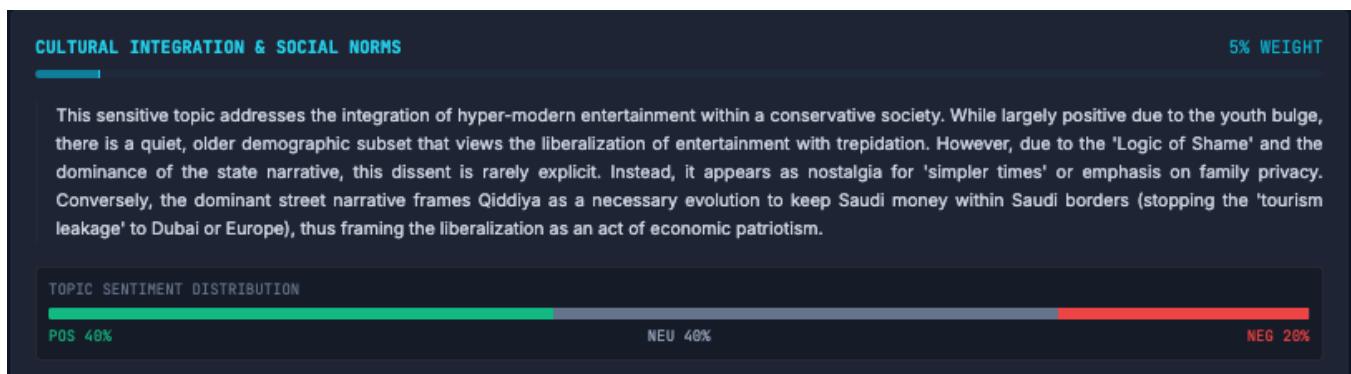
Economic Impact & Saudization: 15% Weight (Sentiment: 50% Pos / 35% Neu / 15% Neg)

Support for Qiddiya is conditional on meaningful Saudi employment. The Logic of Consequences dominates: enthusiasm increases when Saudization is visible and drops sharply when expatriate labor is perceived to dominate. Employment outcomes are treated as proof of sincerity.



Cultural Integration & Social Norms: 5% Weight (Sentiment: 40% Pos / 40% Neu / 20% Neg)

This is a low-volume but very sensitive topic. Older Saudis express nostalgia rather than overt resistance. The dominant narrative reframes liberalized entertainment as economic patriotism that keeps Saudi spending inside Saudi Arabia.



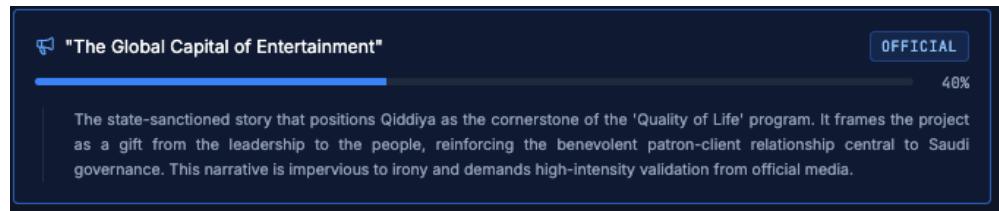
Narrative Analysis:

Dominant Narrative: "The Playground of the Future Identity"

This is the way Qiddiya is understood by the public. It frames Qiddiya as the place where Saudi Arabia's future way of life is being built, tying entertainment, national pride, and modernization into a single story of progress that sustains public support even during delays

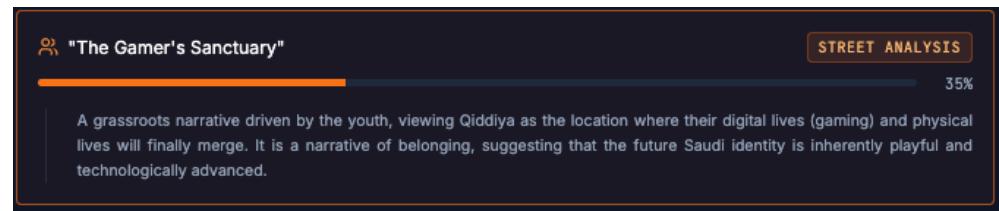
Official Narrative (40%): "The Global Capital of Entertainment"

A state-driven narrative that positions Qiddiya as a benevolent gift and a cornerstone of national transformation.



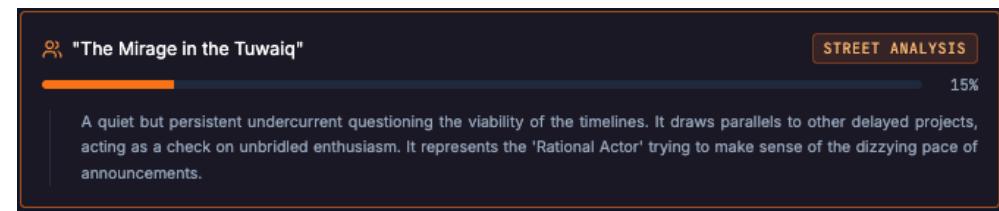
Street Narrative (35%): "The Gamer's Sanctuary"

A youth-led narrative of belonging, where digital identity and national identity converge.



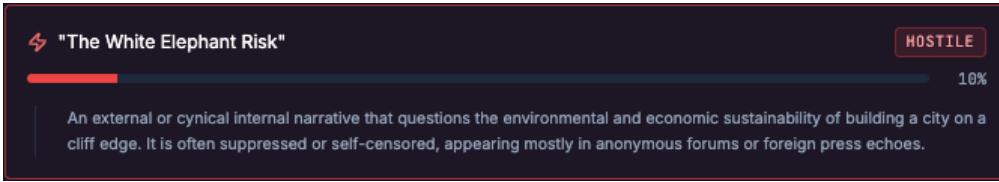
Street Sub-Narrative (15%): "The Mirage in the Tuwaiq"

A rational, quiet skepticism focused on timelines and delivery realism.



Hostile (Narrative 10%): "The White Elephant Risk"

A marginal, often external narrative questioning sustainability and scale, largely suppressed domestically.



Value Proposition:

ENODO's IaaS platform reveals that Qiddiya's true strength lies not in the scale of its investment or the ambition of its design, but in its deep alignment with Saudi national identity and the aspirations of a young, future-oriented population. The project benefits from high public trust, low cynicism, and strong symbolic legitimacy, factors that cannot be measured solely by traditional market research or financial models.

Where IaaS delivers unique value is in revealing the risk that conventional analysis overlooks. The challenge facing Qiddiya is not rejection, but fatigue driven by a growing gap between future-focused promises and present-day experience. By continuously tracking identity stability, sentiment shifts, and dominant narratives, IaaS gives leaders early warning of perception risk and the ability to adjust messaging, timing, and delivery before enthusiasm erodes. In doing so, the platform turns narrative management into a measurable, actionable discipline—protecting long-term public support while safeguarding Vision 2030's strategic objectives.

“Qiddiya does not suffer from a belief deficit. It faces an execution-perception gap. IaaS exists to close that gap—before stability erodes.”

